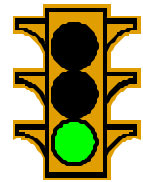


# BENEFIT SERVICES DIVISION DASHBOARD



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## STRATEGIC GOALS

- V.** Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.
- VI.** Administer pension benefit services in a customer oriented and cost effective manner.

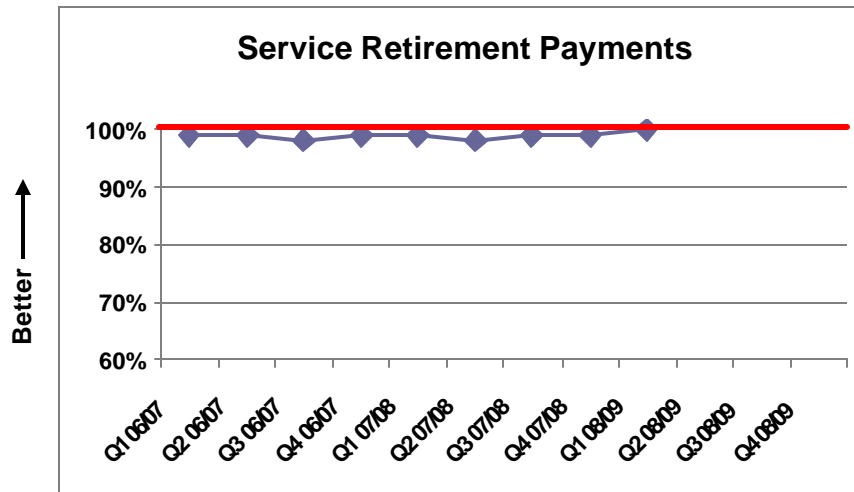
## MEASURE:

Percent of applicants whose first payment is made within 30 calendar days of retirement effective date or application.

## Service Retirement Payments

Target: 100%

Year	Q1	Q2	Q3	Q4
2008-09	100%			
2007-08	99%	98%	99%	99%
2006-07	99%	99%	98%	99%



**INITIATIVES:** Administer retirement benefits efficiently and effectively

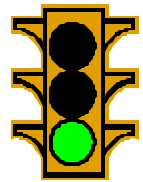
Initiatives	Milestones
Continually upgrade automation capability.	<ul style="list-style-type: none"> <li>Provide on-line access for members to apply for service retirement via the Internet.</li> <li>Partner with ITSB to deliver benefits more efficiently.</li> </ul>

## COMMENTS:

- Service retirement payments represent the highest priority workload for this Section and every effort is made to ensure members receive their first payment with no gap from their last employment paycheck.

1st Quarter 2008-09

# BENEFIT SERVICES DIVISION DASHBOARD



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## STRATEGIC GOALS

- V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.*
- VI. Administer pension benefit services in a customer oriented and cost effective manner.*

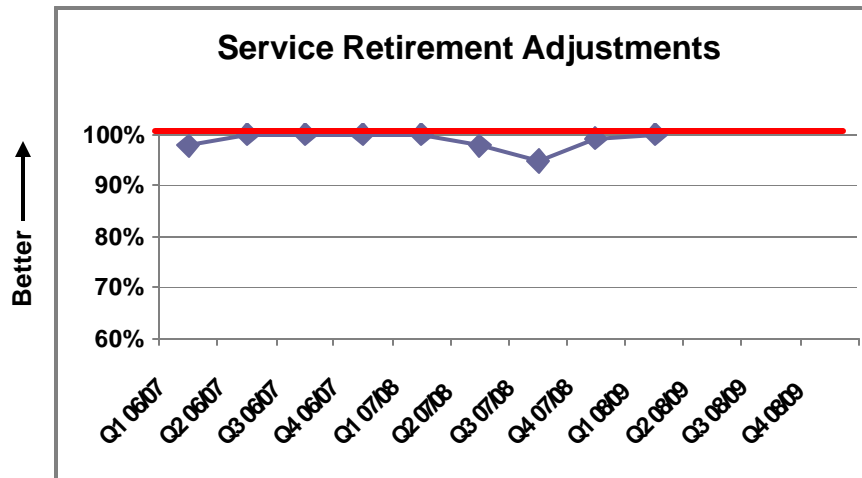
## MEASURE:

*Percent of final adjustments made to service retirement benefits within 9 months of the retirement effective date.*

## Service Retirement Adjustments

Target: 100%

Year	Q1	Q2	Q3	Q4
2008-09	99%			
2007-08	100%	98%	95%	99%
2006-07	98%	100%	100%	100%



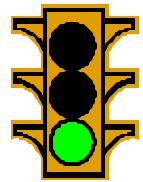
**INITIATIVES:** *Administer retirement benefits efficiently and effectively*

## COMMENTS:

- Service retirement adjustments are dependent upon final payroll reporting from employers and performance varies accordingly.

Initiatives	Milestones
Continually upgrade automation capability.	<ul style="list-style-type: none"> <li>• Partner with ITSB to deliver benefits more efficiently.</li> </ul>

# BENEFIT SERVICES DIVISION DASHBOARD



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## STRATEGIC GOALS

**V.** Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.

**VI.** Administer pension benefit services in a customer oriented and cost effective manner.

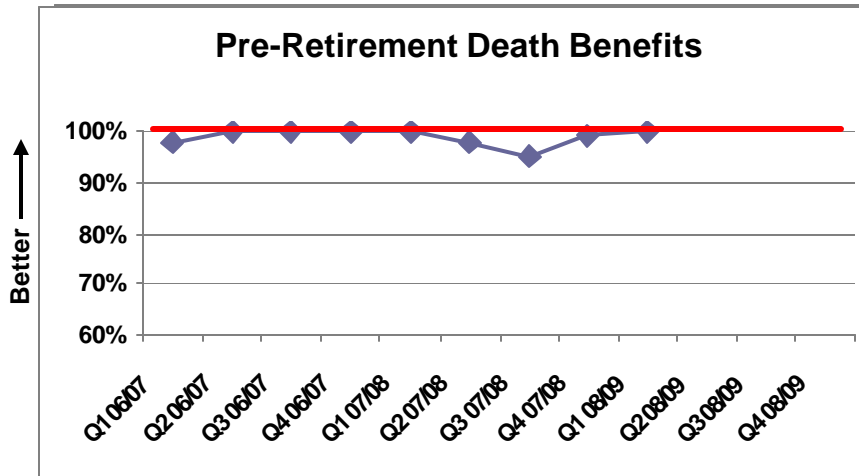
## MEASURE:

Percentage of death benefit claims paid within 45 days of receipt of last required documentation. (Pre-retirement)

## Pre-Retirement Death Benefit Payments

Target: 100%

Year	Q1	Q2	Q3	Q4
2008-09	99%			
2007-08	99%	99%	98%	98%
2006-07	99%	99%	96%	100%



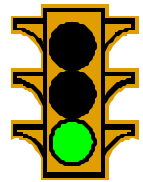
**INITIATIVES:** Administer retirement benefits efficiently and effectively

## COMMENTS:

- Pre-retirement death benefits performance fell short of the goal in the first quarter.

Initiatives	Milestones
Continually upgrade automation capability.	<ul style="list-style-type: none"> <li>Partner with ITSB to deliver benefits more efficiently.</li> </ul>

# BENEFIT SERVICES DIVISION DASHBOARD



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## STRATEGIC GOALS

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- VI.** Administer pension benefit services in a customer oriented and cost effective manner.

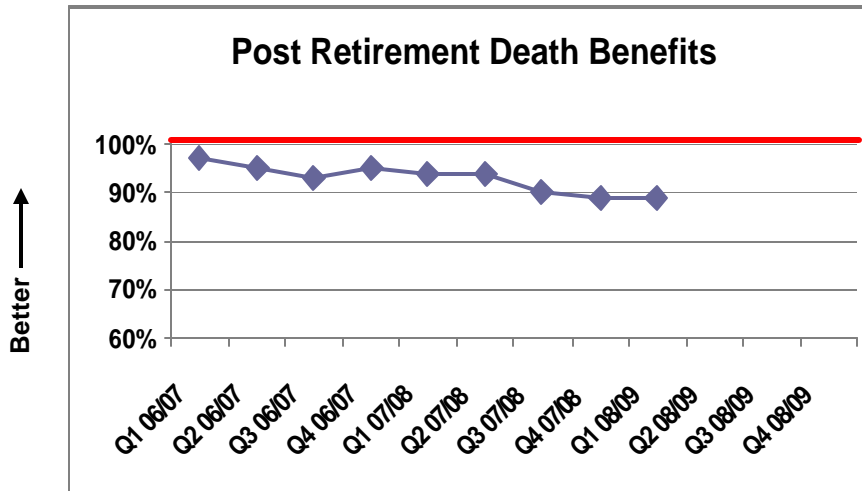
## MEASURE:

Percentage of death benefit claims paid within 45 days of receipt of last required documentation. (Post-retirement)

## Post-Retirement Death Benefits

Target: 100%

Year	Q1	Q2	Q3	Q4
2008-09	89%			
2007-08	94%	94%	90%	89%
2006-07	97%	95%	93%	95%



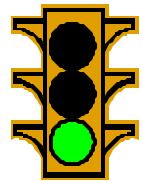
**INITIATIVES:** Administer retirement benefits efficiently and effectively

Initiatives	Milestones
Continually upgrade automation capability.	<ul style="list-style-type: none"> <li>Partner with ITSB to deliver benefits more efficiently.</li> </ul>

## COMMENTS:

- Several new staff in this workload area were recently hired and are still in training, and this should increase processing of death benefit claims in subsequent quarters.

# BENEFIT SERVICES DIVISION DASHBOARD



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## STRATEGIC GOALS

*V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.*

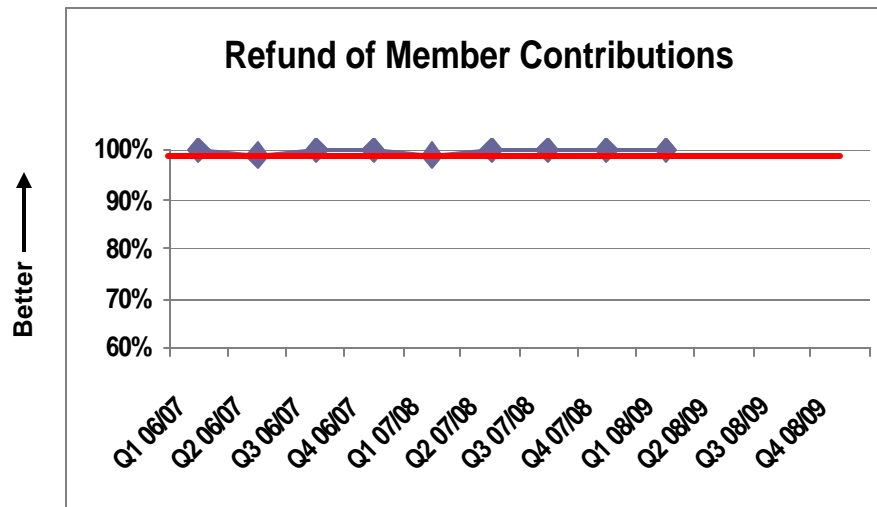
*VI. Administer pension benefit services in a customer oriented and cost effective manner.*

## MEASURE:

*Percentage of first refunds paid to eligible members within 30 calendar days of receipt of a valid election form.*

## Refund Payments

**Target: 100%**



Year	Q1	Q2	Q3	Q4
2008-09	100%			
2007-08	99%	100%	100%	100%
2006-07	100%	99%	100%	100%

**INITIATIVES:** *Administer retirement benefits efficiently and effectively*

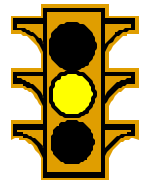
Initiatives	Milestones
Continually upgrade automation capability.	<ul style="list-style-type: none"> <li>Partner with ITSB to deliver benefits more efficiently.</li> </ul>

## COMMENTS:

- Performance in refunds consistently reaches goal.

1st Quarter 2008-09

# BENEFIT SERVICES DIVISION DASHBOARD



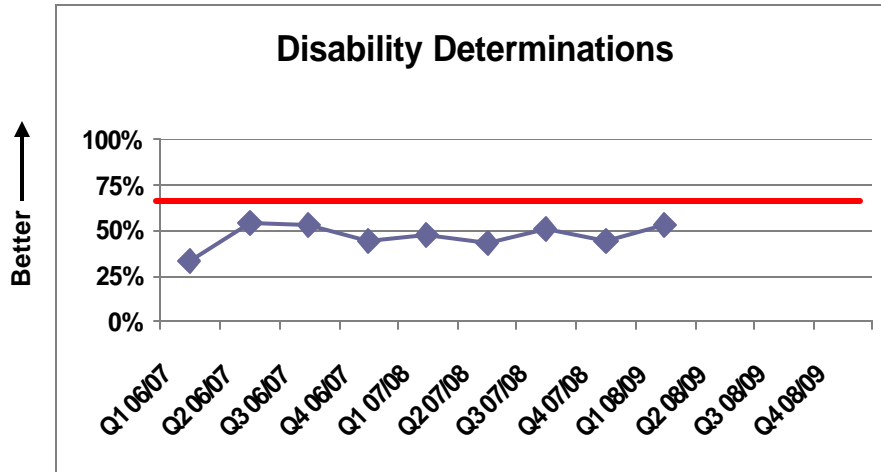
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## STRATEGIC GOALS

- V.** Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.
- VI.** Administer pension benefit services in a customer oriented and cost effective manner.

## MEASURE:

Percent of disability determinations made regarding approval or disapproval within 6 months of receipt of complete application packages.



## Disability Determinations

**Target:** 70%

Year	Q1	Q2	Q3	Q4
2008-09	53%			
2007-08	47%	44%	51%	45%
2006-07	33%	54%	52%	45%

## INITIATIVES: *Administer retirement benefits efficiently and effectively*

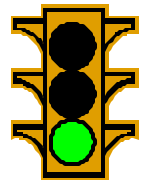
Initiatives	Milestones
Expand and improve education outreach to members and employers.	<ul style="list-style-type: none"> <li>Partner with MBSB, AESB and PAO on education and communication to deliver benefits more efficiently.</li> </ul>
Continual staff education in determination processing and workload management.	<ul style="list-style-type: none"> <li>By 12/08, implement additional tools to gauge workload progress.</li> <li>By 5/09, identify skill gaps to further staff development.</li> </ul>

## COMMENTS:

- Dashboard code remains yellow as we continue to see improvements from complete application packages (i.e. application, job duties, medical information)
- Implemented enhanced training program to improve curriculum, training plans and methodology.
- Redirected workload and resources to improve timeliness in the review of complete application packages.
- Disability determinations processed showed a 10% increase due to improvements in staff knowledge and skills.

1st Quarter 2008-09

# BENEFIT SERVICES DIVISION DASHBOARD



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## STRATEGIC GOALS

**V.** Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.

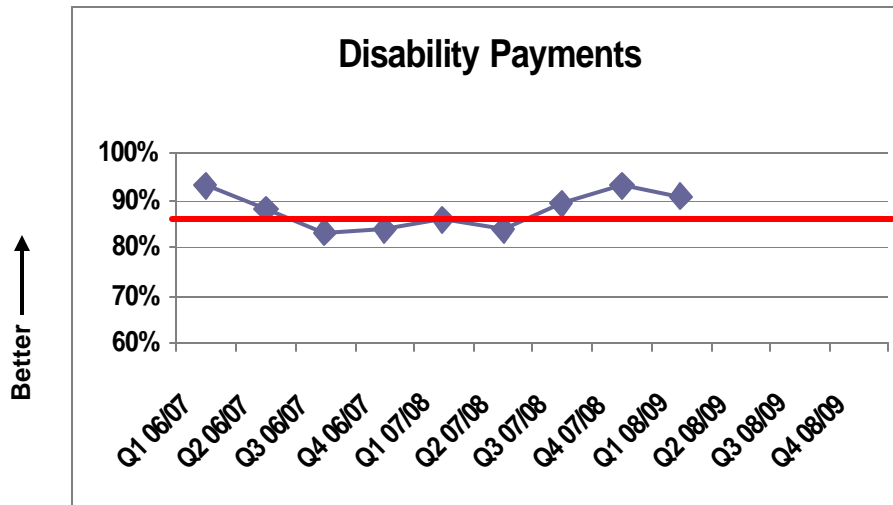
**VI.** Administer pension benefit services in a customer oriented and cost effective manner.

## MEASURE:

Percent of first disability payments made within 30 days of effective date or approval.

## Disability Payments

Target: 85%



Year	Q1	Q2	Q3	Q4
2008-09	91%			
2007-08	86%	84%	89%	93%
2006-07	93%	88%	83%	84%

**INITIATIVES:** Administer retirement benefits efficiently and effectively

Initiatives	Milestones
Continually upgrade automation capability.	<ul style="list-style-type: none"> <li>Partner with ITSB to deliver benefits more efficiently.</li> </ul>

## COMMENTS:

- Last year, performance consistently exceeded the goal for disability retirement payments. This year, we elevated the goal from 80% to 85% of first disability payments made within 30 days of effective date or approval.